

Win/Loss Sparkline Visualization in Tableau

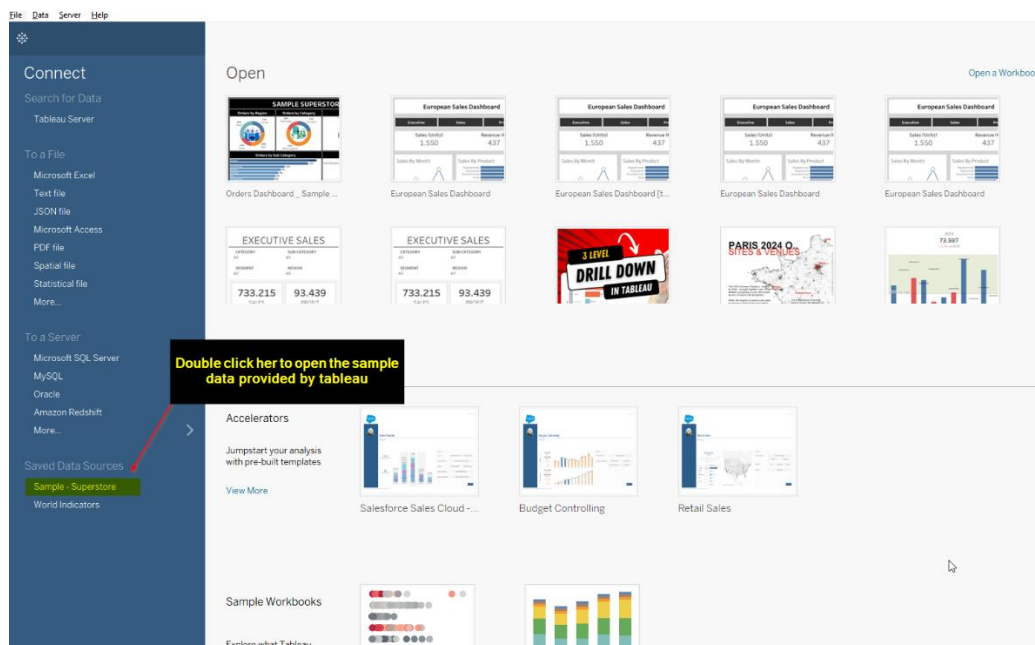
Overview

This guide provides a step-by-step process to create a win/loss sparkline visualization in Tableau using the **Product Sub-Category** and **Order Date** fields. This visualization enables quick insights into performance trends over time.

Steps to Create the Visualization

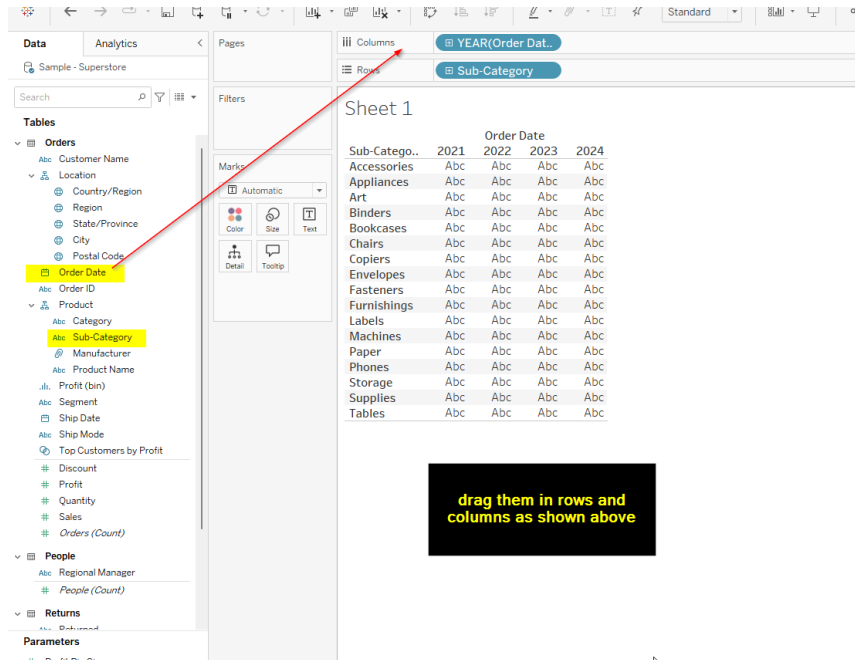
Step 1: Connect to Data

1. Drag **Product Sub-Category** to the Rows shelf.
2. Drag **Order Date** to the Columns shelf.



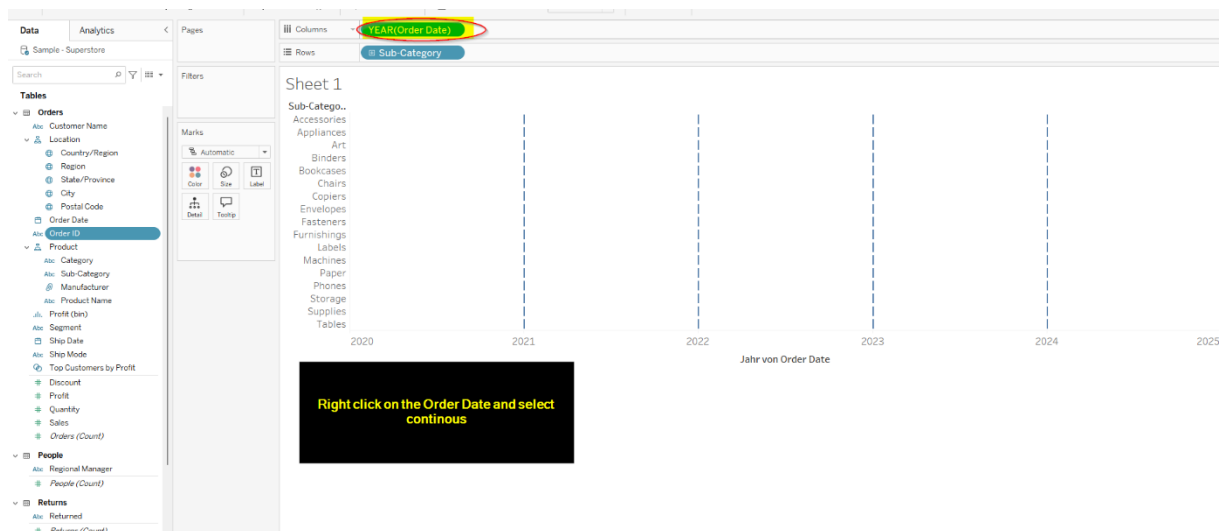
Step 2: Make Order Date Continuous

- Change the **Order Date** field to continuous for a better time-series analysis.



Step 3: Display Monthly Data

- Right-click on **Order Date** and select **Month** to see a monthly trend.



Step 4: Create a Win/Loss Calculated Field

- Create a new calculated field using the **SIGN function** in Tableau to determine win/loss:

`SIGN(SUM([Profit]))`

- **1** if the total profit is positive.
 - **-1** if the total profit is negative.
 - **0** if the total profit is zero.
- Drag this field to the visualization.

Win/loss

`SIGN(SUM([Profit]))`

create a calculated field with the sign function as shown above

The calculation is valid.

Apply OK

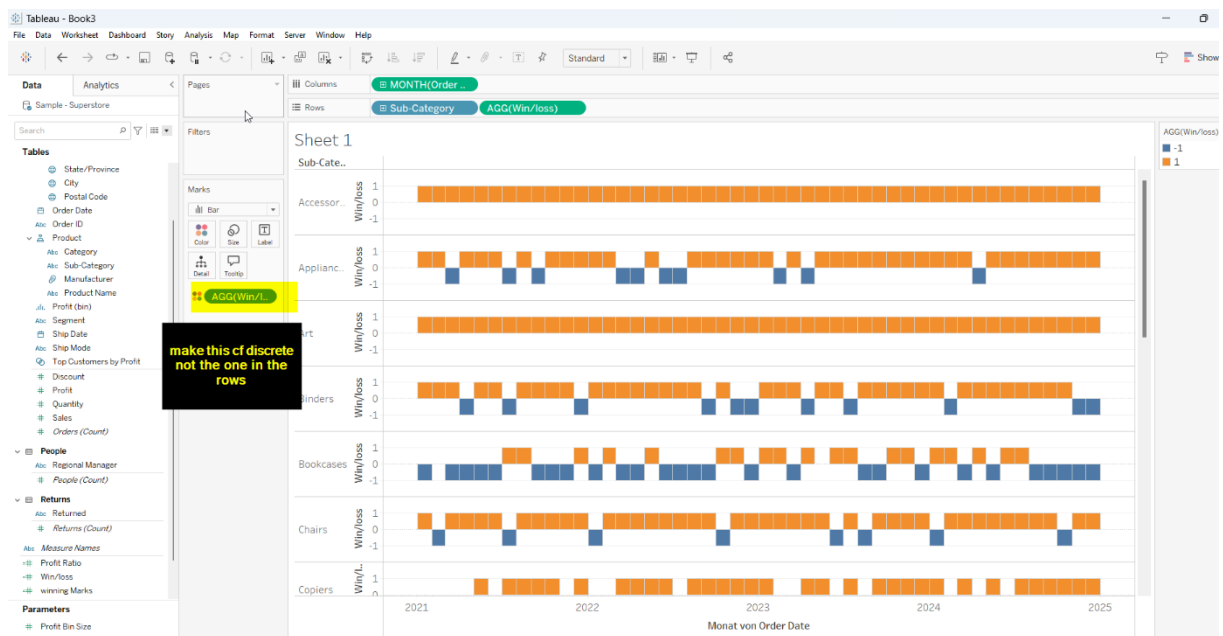
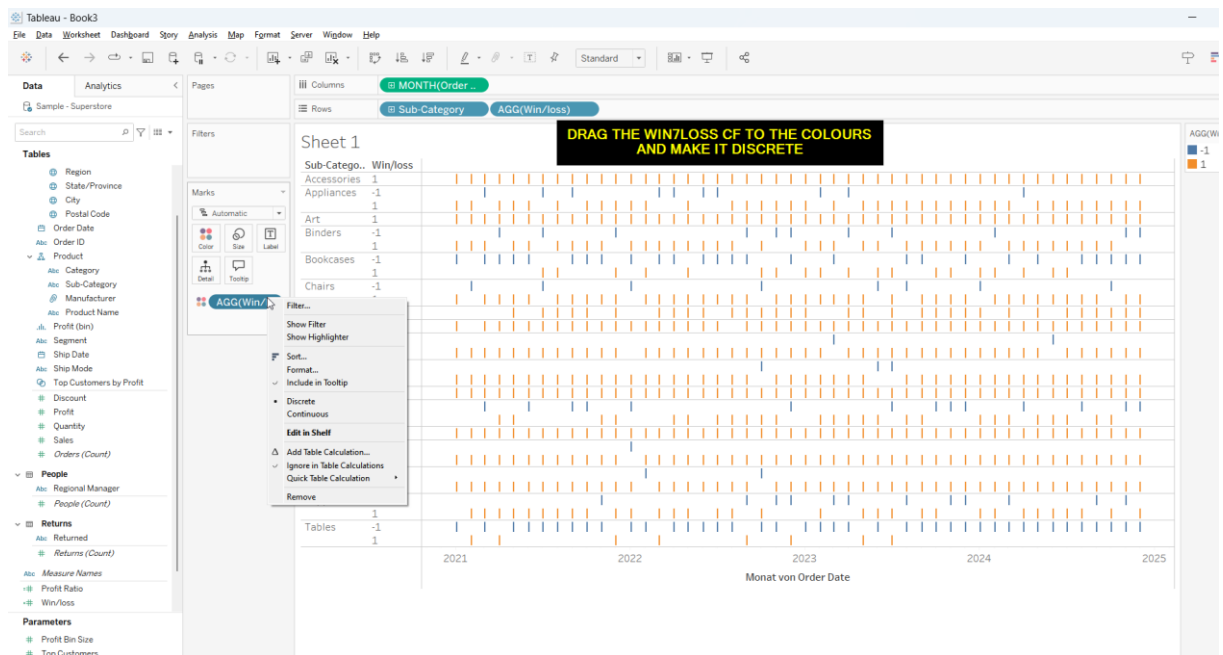
SUM(expression)

Returns the sum of all the values in the expression. SUM can be used with numeric fields only. Null values are ignored.

Example: SUM([Profit])

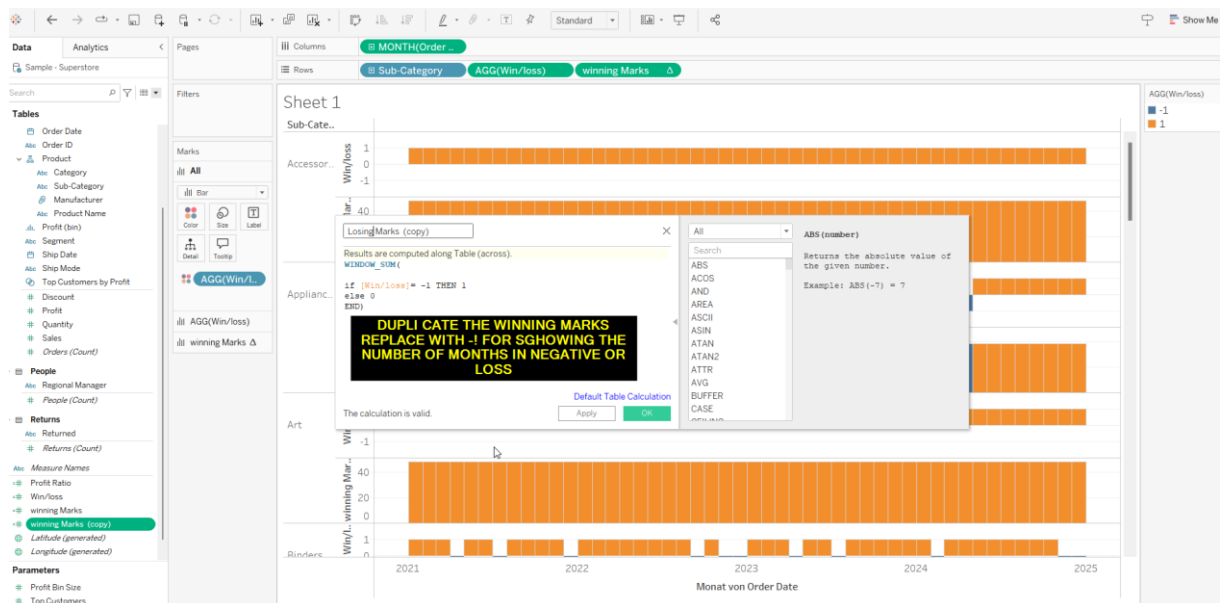
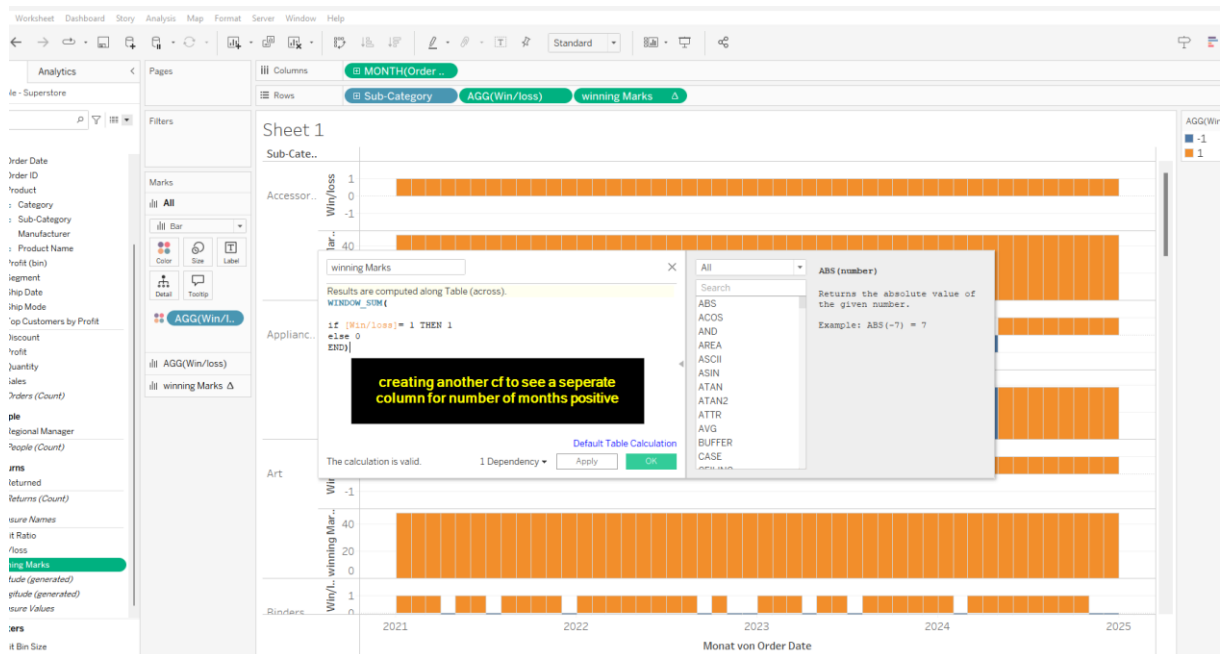
SIGN
SIN
SIZE
SPACE
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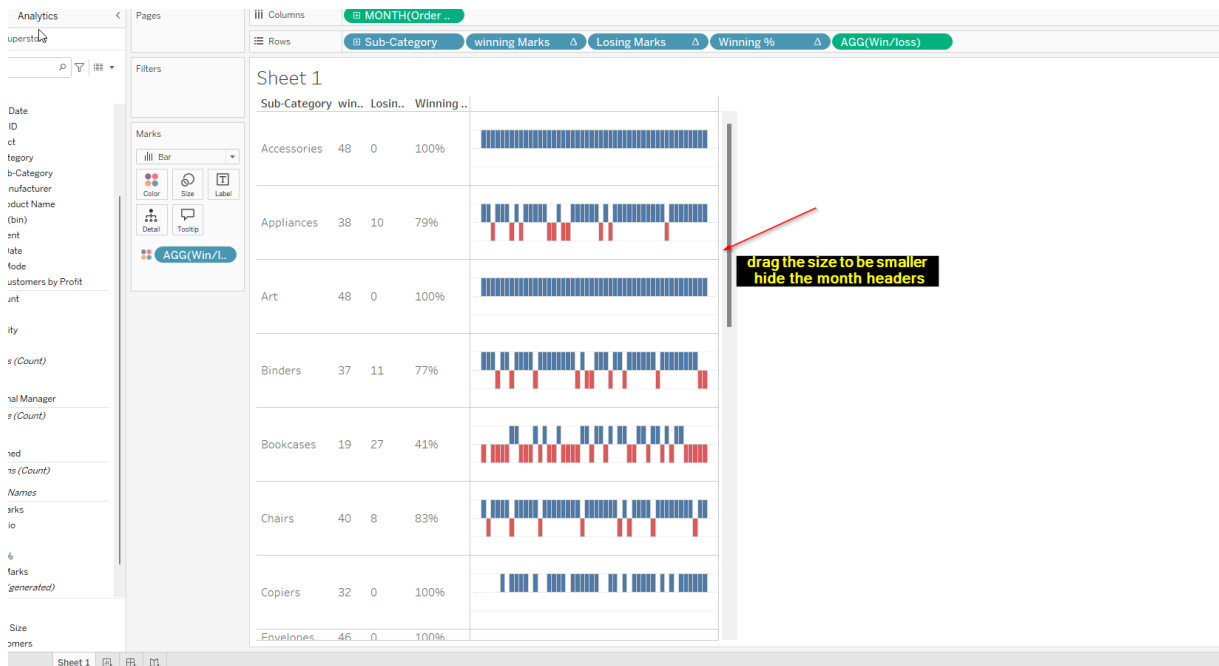
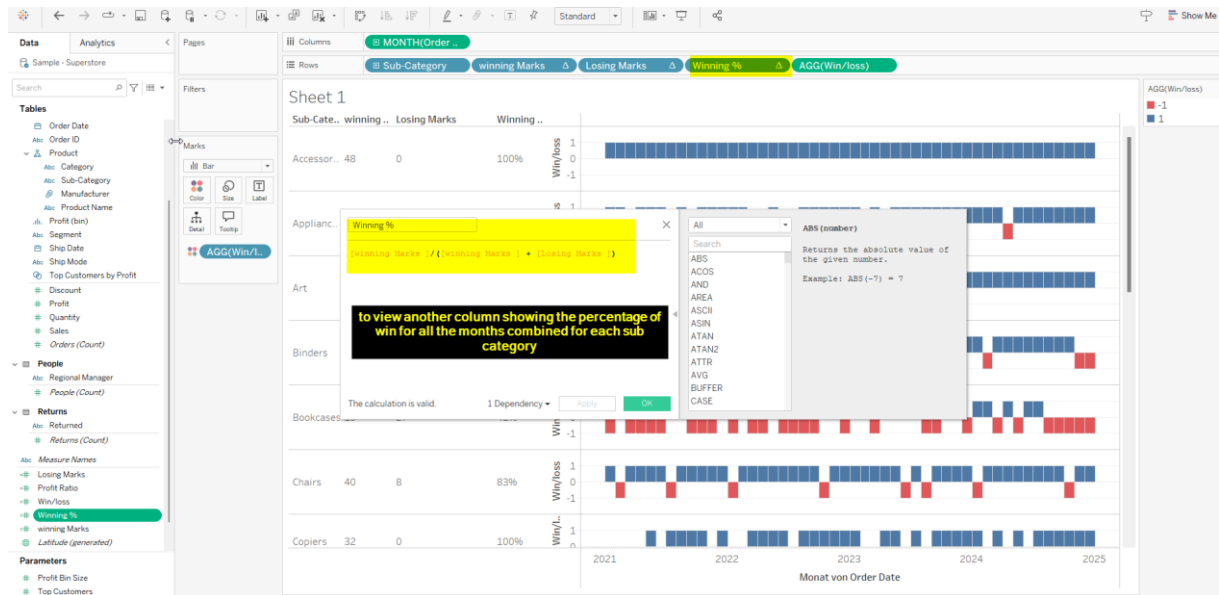
Step 5: Make the Win/Loss Field Discrete

- Convert the win/loss field into a discrete dimension to distinguish between winning and losing months.



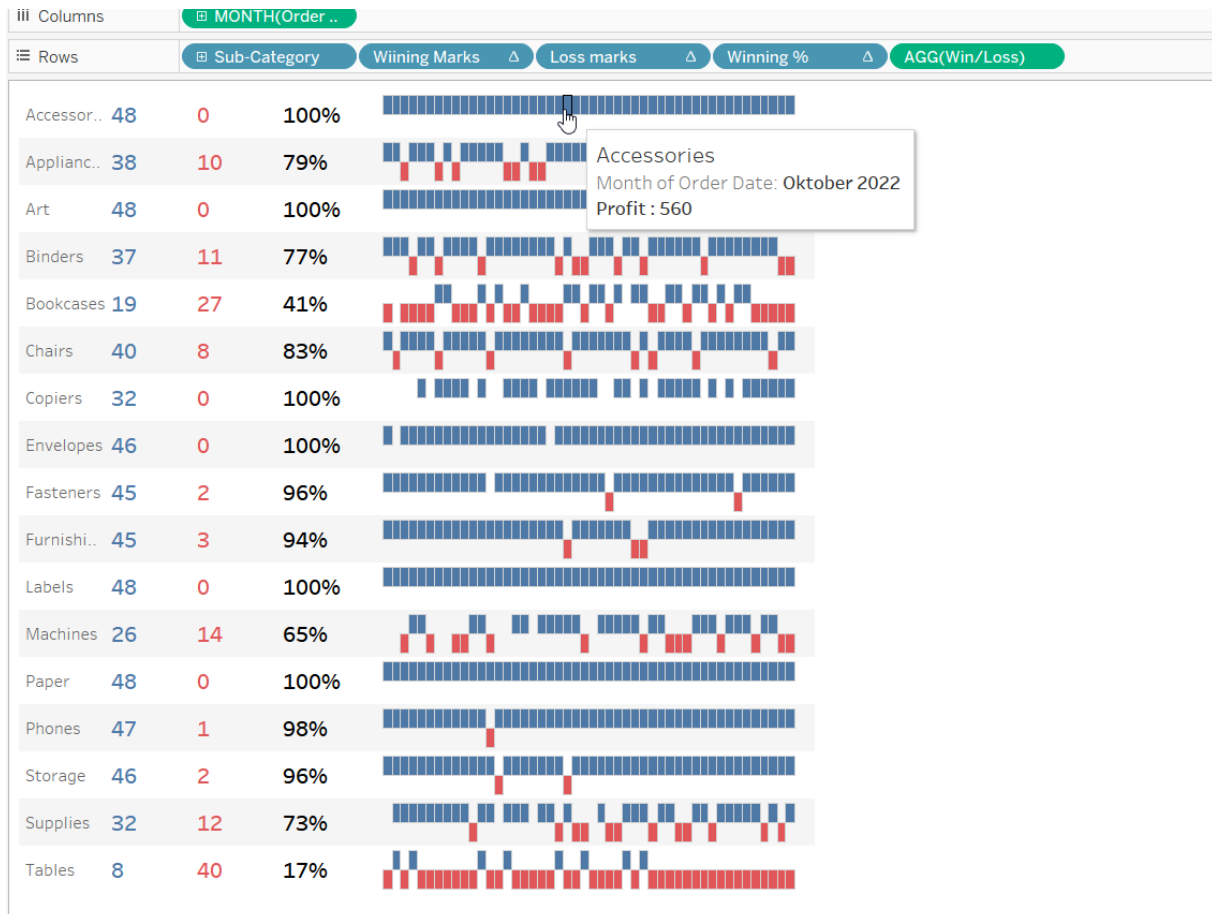
Step 6: Display Win Percentage

- Add another column to show the **percentage of winning months** for each **Product Sub-Category**.



Step 7: Format the Visualization

- Apply custom **colors and fonts** to enhance readability and visual appeal.



Summary

This win/loss sparkline visualization provides a quick and effective way to evaluate performance trends by sub-category. The discrete win/loss representation combined with the win percentage column enhances readability and decision-making.